



## B0185: LOA ACTION WITH ABSENCES REPORT

The B0185: LOA Action with Absences report was developed to help monitor timesheet data entry in the BEACON HR/Payroll system while an employee is on an LOA event. This monitoring tool will assist OSP and Agencies in ensuring that the policies regarding leave usage during an LOA event are being followed. A high level of visibility will be achieved by matching timesheet records covering the LOA action effective period to the dates of the LOA action event. In addition, this report will provide statistics such as the number of LOA events within a period and total hours of LOA with and without pay.

The purpose of this job aid is to describe how this reporting tool can be used to assist OSP and Agencies in spotting and interpreting some of the anomalies in the way timesheet records are entered into the system which relate to the LOA action.

This job aid assumes that the report user has been trained and is well versed in BI report basic navigation and these topics are not covered by this document. Instructions will be given on what navigation steps are needed for some uses of the report but all topics are not covered in detail. The BEACON training team has provided training materials and/or instructor led training sessions to assist BI report users in acquiring basic navigation skills and anyone not well versed in using BI reports should refer to those resources prior to attempting to use this report.

### REPORT FEATURES AND LAYOUT

The variable entry screen:

**B0185: LOA Action with Absences**

Variable Entry

Available Variables:  Save Save As... Delete [Show Variable Personalization](#)

General Variables		
Variable	Current Selection	Description
* Organizational Unit	<input type="checkbox"/>	
* From Day (Single Value, Mandatory)	<input type="checkbox"/>	
* To Day (Single Value, Mandatory)	<input type="checkbox"/>	
Action Reason (Optional)	<input type="checkbox"/>	
Personnel Area(s) (Optional)	<input type="checkbox"/>	
Employee(s) PersNo. (Optional)	<input type="checkbox"/>	

OK Check

The variable entry screen on this report is very similar to other BI reports with the exception of how the date selection works. The date selection on this report is designed to enable the user to answer the question of who is/was on LOA at any point in time. This is different than most reports in that a typical selection period might include only the actions where the begin date of the action fell between the date ranges. In the case of this report both the begin date and end date are taken into consideration. For example:

## Sample Action Records:

Employee	Action Type	Action Reason	Begin Date	End Date
Olive Oyl	LOA	FMLA	3/17/2009	2/16/2010
Barney Fife	LOA	Extended Illness	5/20/2010	7/3/2011
Betty Boop	LOA	FMLA	2/23/2009	4/19/2009
Pink Panther	LOA	Extended Illness	3/31/2008	12/31/9999

## Report Date Selection behavior if dates entered are:

From Day = 7/1/2009

To Day = 6/31/2010

Records are selected based on whether either the begin date or the end date of the record is effective between the 'From Day' and 'To Day' of the variable entry screen. See the example of selected records below, each are selected because either the begin date or end date of the action was effective between the report selection dates:

Employee	Action Type	Action Reason	Begin Date	End Date
Olive Oyl	LOA	FMLA	3/17/2009	<b>2/16/2010</b>
Barney Fife	LOA	Extended Illness	<b>5/20/2010</b>	7/3/2011
*Pink Panther	LOA	Extended Illness	3/31/2008	<b>12/31/9999</b>

\*The record for Pink Panther is selected because it was still effective on 6/31/2010.

The record for Betty Boop is not selected because neither the begin nor end dates of the action falls between the report selection dates.

## The Default Report Layout:

Organizational Unit	Employee's Name	Employee	LOA Strt Dt	LOA End Dt	Action Reason	Load Date 11/03/2011					
						LWP Hours 9000 9200 9300 9685	LWOP Hours 9400	Other Hours	Total Hours	Total Abs Days	Action Reason Count
20001068	R SPR DS TS NCWSE BUS SERV Serv Desk	DAFFY, DUCK	07/23/2008	09/23/2008	19	S/T Disability 60 Day w/Period	440.00		440.00	55.010	1
			09/24/2008	08/31/2009	20	Short-Term Disability Regular	50.62	0.00	50.62	6.340	1
20006752	COR SO DS2 PRI P Lane CA C/O U3 AU 507	MOUSE, MINNIE	11/08/2008	01/10/2009	01	FMLA		0.00	0.00	0.000	1
			06/29/2009	07/19/2009	01	FMLA		0.00	0.00	0.000	1
			08/01/2009	11/09/2009	08	Extended Illness		0.00	0.00	0.000	1
			11/07/2009	02/26/2010	01	FMLA		0.00	0.00	0.000	1
			04/05/2010	12/31/9999	08	Extended Illness		0.00	0.00	0.000	1
20006933	COR SO DS2 PRI E Bertie CA C/O C3 L	RICH, RICHE	10/01/2010	10/28/2010	19	S/T Disability 60 Day w/Period		0.00	0.00	0.000	1
			10/29/2010	11/05/2010	20	Short-Term Disability Regular		0.00	0.00	0.000	1
			03/02/2011	10/26/2011	20	Short-Term Disability Regular		44.25	44.25	5.000	1
20007506	COR SO DS2 PRI C CP W DW A/V/O U3 ML AL S4	PANTHER, PINK	03/13/2008	12/31/9999	08	Extended Illness		160.00	160.00	20.000	1
20006754	COR SO DS2 PRI P Sent CS AS 506	BOOP, BETTY	10/26/2010	11/21/2010	23	Other	160.00		160.00	20.000	1
			12/07/2010	12/26/2010	08	Extended Illness	101.72	26.28	128.00	16.010	1
20010489	CCPS SHP SO Aviation Unit	FLINSTONE, FRED	04/15/2009	04/19/2009	10	Reserve Active Duty (Leave)			24.00	3.000	1
					27	Extended Military		0.00	0.00	0.000	1
			05/01/2009	05/06/2009	10	Reserve Active Duty (Leave)	16.00		16.00	32.000	1
			04/19/2010	05/03/2010	10	Reserve Active Duty (Leave)		68.00	68.00	11.000	1
20010606	CCPS SHP Troop C/District 9	BUNNY, BUGS	04/01/2008	04/13/2008	09	Reserve Active Duty (30 Days)			72.00	2.970	1
			04/14/2008	09/16/2008	25	Reserve Active Duty		0.00	0.00	0.000	1
			09/17/2008	09/23/2008	10	Reserve Active Duty (Leave)	48.00		48.00	5.000	1
			09/24/2008	10/23/2008	09	Reserve Active Duty (30 Days)		176.00	176.00	22.000	1
			10/24/2008	03/29/2009	25	Reserve Active Duty		0.00	0.00	0.000	1
			03/30/2009	04/12/2009	10	Reserve Active Duty (Leave)	48.00		64.00	14.000	1
			04/27/2009	05/17/2009	10	Reserve Active Duty (Leave)	72.00		48.00	12.000	1
			10/01/2009	10/15/2009	10	Reserve Active Duty (Leave)		88.00	88.00	11.000	1

The screen shot above is a sample of the default report layout. In this view the data is presented by orgunit, employee and LOA action reason/date. The key figures on the report break out the hours entered on the timesheet by categories of LWP, LWOP and Other. This should allow the user to determine at a glance how well the timesheet data entry matches the employee action that was entered. Additional information such as time type, timesheet record dates and employee work schedule are available as free characteristics.

Within the BEACON time entry system the following time types are used to cover the portion of time that the LOA is with pay (LWP):

9000 – Approved Leave

9200 – Sick Leave

9300 – Holiday Leave

9685 – Injury Leave

To designate the portion of time that the LOA event is without pay (LWOP) the following time type is used:

9400 – Leave Without Pay.

Any time entry coded with time types not listed above may be in error and should be reviewed in detail and corrected where appropriate.

## KNOWN TIMESHEET ENTRY ERRORS

By observing some of the details in the existing data within the BEACON HR/Payroll system certain data entry errors or anomalies have been identified. These scenarios are outlined below along with any report navigation steps that may be needed in order to highlight the existence of these issues. The report user should not assume that these are the only types of anomalies' to exist and should inspect the records carefully to determine if any other errors exist.

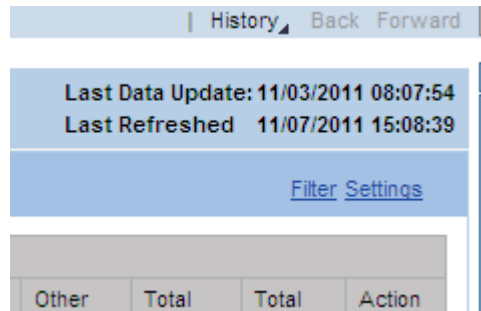
### Examples of Known Issues:

1. **No Time Entry Covering LOA Event:** This generally occurs when time is entered after the employee returns to work. Entering timesheet records after the fact can lead to an overpayment

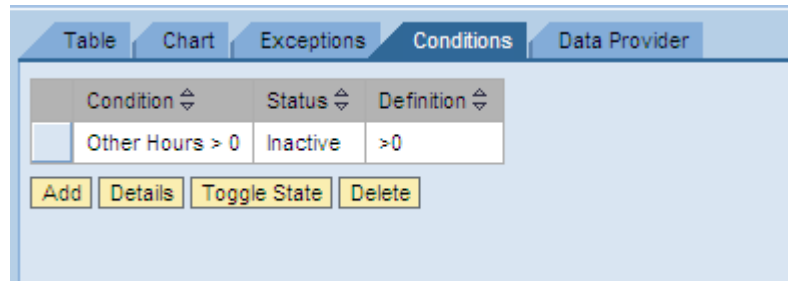
situation. By comparing the total hours entered as compared to the total number of days absent it should be easy to spot where timesheet data entry has not fully covered the absence period so that this situation can be corrected. In some cases it may be that part of the time has been entered but not all of it. This will be evaluated by comparing the effective dates of the action to the total number of hours entered. There are also cases where there has never been any time entry. This is a little easier to evaluate because generally you will see zeros in all the key figures related to the action.

An easy way to gather all of these records together is to create a condition where the total hours = 0. In order to set this you will need to:

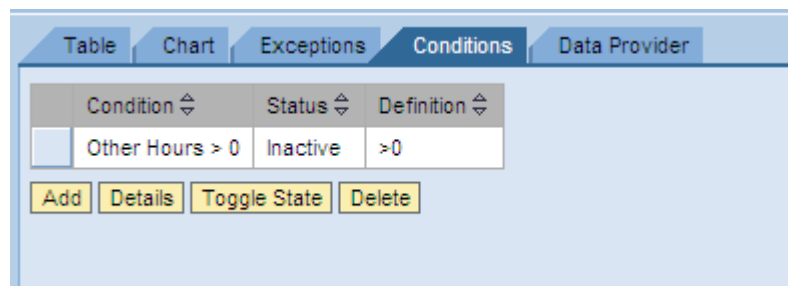
- a. Click on the settings option on the upper right side of the report.



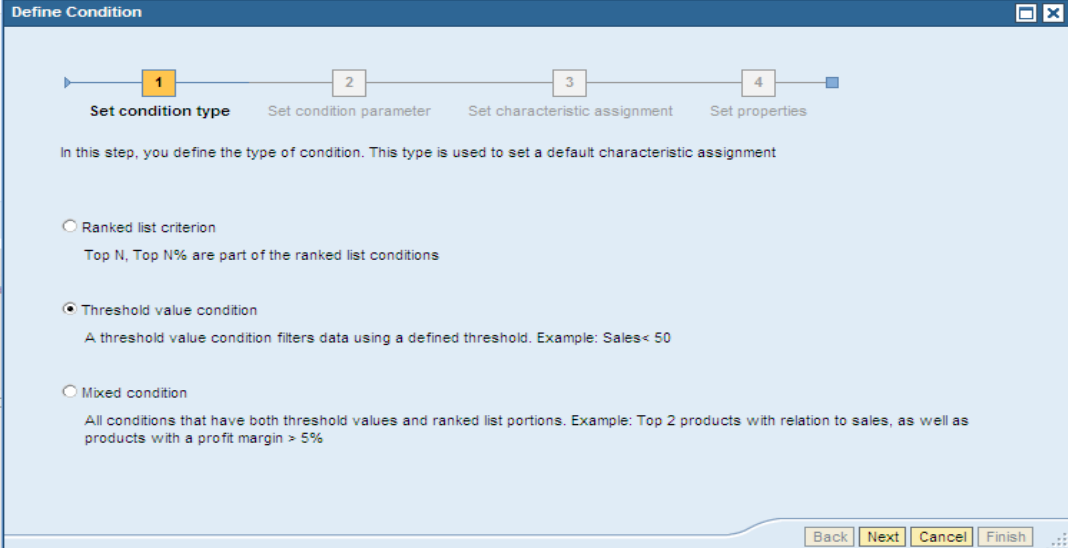
- b. Click on the conditions tab.



- c. Click on the 'Add' button.



- d. Click on the 'Threshold value condition' option. Then 'Next'.



**Define Condition**

1 2 3 4

**Set condition type** Set condition parameter Set characteristic assignment Set properties

In this step, you define the type of condition. This type is used to set a default characteristic assignment

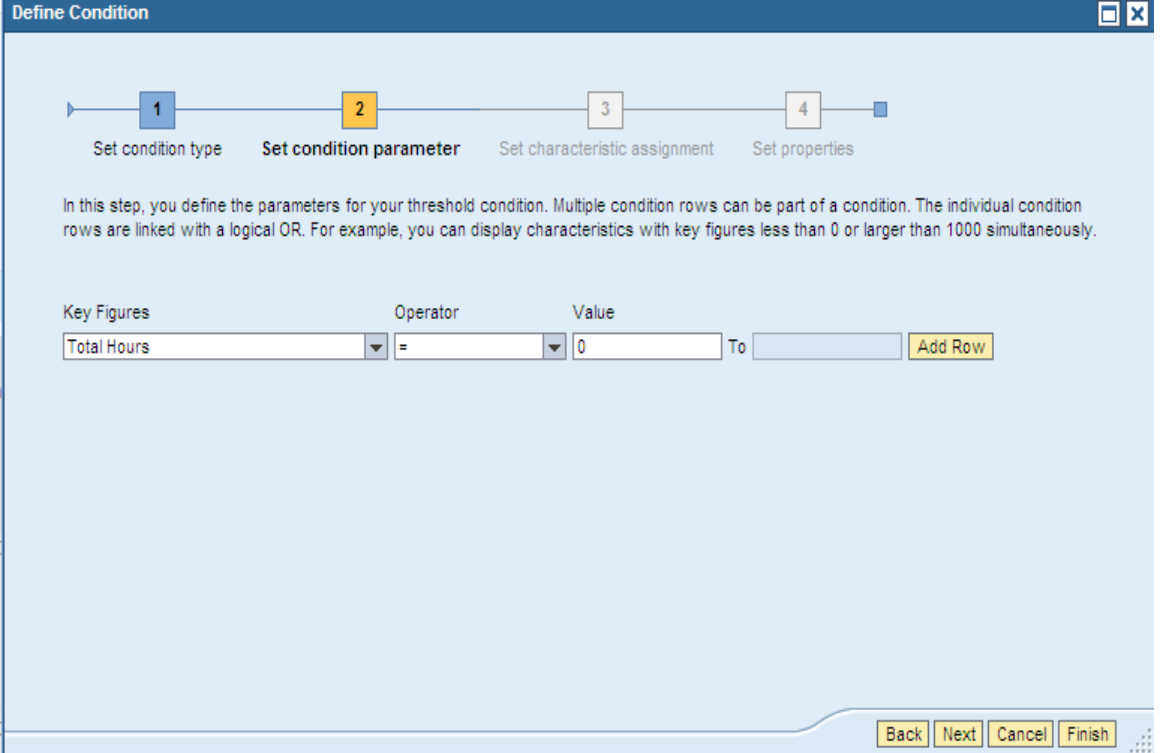
☐ Ranked list criterion  
Top N, Top N% are part of the ranked list conditions

☒ Threshold value condition  
A threshold value condition filters data using a defined threshold. Example: Sales < 50

☐ Mixed condition  
All conditions that have both threshold values and ranked list portions. Example: Top 2 products with relation to sales, as well as products with a profit margin > 5%

Back Next Cancel Finish

- e. Select the 'Total Hours' Key figure from the drop down. Use the '=' operator and enter 0 for the value. Click on 'Finish'



**Define Condition**

1 2 3 4

Set condition type **Set condition parameter** Set characteristic assignment Set properties

In this step, you define the parameters for your threshold condition. Multiple condition rows can be part of a condition. The individual condition rows are linked with a logical OR. For example, you can display characteristics with key figures less than 0 or larger than 1000 simultaneously.

Key Figures	Operator	Value	To
Total Hours	=	0	

Add Row

Back Next Cancel Finish

This will create a simple list of all LOA records with no time entered. See the example below:

Organizational Unit		Employee's Name	Employee	LOA Start Dt	LOA End Dt	Action Reason	Load Date	LIVP Hours 9000 9000 9000 9685	LIVOP Hours 9400	Other Hours	Total Hours	Total Abs/Abs Days	Action Reason Count
20006752	COR SO D52 PRI P Lane CA C/O U3 AU SOT	MOUSE, MARIE		11/09/2009	01/10/2009	01	FILA			0.00	0.00	0.000	1
				06/29/2009	07/19/2009	01	FILA			0.00	0.00	0.000	1
				09/01/2009	11/06/2009	08	Extended Illness			0.00	0.00	0.000	1
				11/07/2009	02/08/2010	01	FILA			0.00	0.00	0.000	1
				04/09/2010	12/01/9999	08	Extended Illness			0.00	0.00	0.000	1
20006933	COR SO D52 PRI E Belle CA C/O C3 L	RICH, RICH		10/01/2010	10/29/2010	19	S/T Disability 60 Day w/Period			0.00	0.00	0.000	1
				10/29/2010	11/08/2010	20	Short-Term Disability Regular			0.00	0.00	0.000	1
20010409	CCPS SHP SO Aviation Unit	FLINSTONE, FRED		04/15/2009	04/19/2009	27	Extended Military			0.00	0.00	0.000	1
20010606	CCPS SHP Troop C/District 9	BUNNY, BUGS		04/14/2008	09/16/2008	25	Reserve Active Duty			0.00	0.00	0.000	1
				10/24/2008	03/29/2009	25	Reserve Active Duty			0.00	0.00	0.000	1
				01/01/2010	03/01/2010	25	Reserve Active Duty			0.00	0.00	0.000	1
				07/16/2010	12/01/9999	25	Reserve Active Duty			0.00	0.00	0.000	1
20011983	HKS SO SOS UNTC PHARMACY B	WOMAN, WONDER		03/11/2009	03/11/2009	12	WC 7 Day Waiting Period			0.00	0.00	0.000	1
				03/12/2009	03/19/2009	14	WC Leave of Absence			0.00	0.00	0.000	1
				03/30/2009	05/07/2009	14	WC Leave of Absence			0.00	0.00	0.000	1
				05/27/2009	07/28/2009	14	WC Leave of Absence			0.00	0.00	0.000	1
				09/11/2009	12/01/9999	14	WC Leave of Absence			0.00	0.00	0.000	1
20012972	COR SO D52 PRI S Hoke CS C/O C5 L2 S1	FUGG, ELMER		03/01/2008	06/15/2008	01	FILA			0.00	0.00	0.000	1
				06/26/2008	07/01/2008	20	Short-Term Disability Regular			0.00	0.00	0.000	1
				11/01/2008	03/07/2009	20	Short-Term Disability Regular			0.00	0.00	0.000	1
				03/08/2009	04/12/2009	21	Short-Term Disability Extended			0.00	0.00	0.000	1
				04/16/2009	04/19/2009	21	Short-Term Disability Extended			0.00	0.00	0.000	1
				06/30/2009	09/17/2009	21	Short-Term Disability Extended			0.00	0.00	0.000	1
				10/06/2009	03/30/2010	21	Short-Term Disability Extended			0.00	0.00	0.000	1
20013445	COR SO D52 PRI S Taber CA C/O C1 L1 S3	FUGG, ELMER		03/31/2010	04/19/2010	21	Short-Term Disability Extended			0.00	0.00	0.000	1
Overall Result										0.00	0.00	0.000	25

2. **Time Entry of Non-Policy Time Type within LOA Event Period:** State policy details which types of leave can be used to cover LOA absences. Any other time entry during the effective dates of an LOA action is a violation of that policy. This report identifies timesheet records that have been entered using a time type that is not covered by the policy. In addition, a condition is available on the report that will filter the data to only those employees' time records where an exception has occurred. Use the following steps to enable the condition:
  - a. Click on the settings option on the upper right side of the report.

[History](#)
[Back](#)
[Forward](#)

Last Data Update: 11/03/2011 08:07:54  
Last Refreshed 11/07/2011 15:08:39

[Filter Settings](#)

Other	Total	Total	Action
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- b. Click on the conditions tab.

[Table](#)
[Chart](#)
[Exceptions](#)
[Conditions](#)
[Data Provider](#)

Condition	Status	Definition
Other Hours > 0	Inactive	>0

[Add](#)
[Details](#)
[Toggle State](#)
[Delete](#)

- c. Click on the gray button beside the inactive 'Other Hours' condition to select it. Then click on 'Toggle State' button to change the status of the condition to 'Active'

Condition	Status	Definition
Other Hours > 0	Inactive	>0

This restricts the report to only those records where there are hours entered into the 'Other Hours' column. Other hours simply means that a time type not related to LWP or LWOP was used. See the example below:

							Load Date		11/03/2011			
Organizational Unit	Employee's Name	Employee	LOA Strt Dt	LOA End Dt	Action Reason		LWP Hours	LWOP Hours	Other Hours	Total Hours	Total Att/Abs Days	Action Reason Count
20007806	COR SO D52 PRI C CP W DIW AWO U3 ML AL S4	PANTHER, PINK	03/13/2008	12/31/9999	08	Extended Illness	9000	9400				
20010788	EL Sales Warehouse	DOO, SCOOBY	04/14/2008	12/31/9999	01	FMLA	74.50	160.00	45.50	280.00	35.000	1
Overall Result							74.50	160.00	205.50	440.00	55.000	2

You can add the time record details from the 'Free Characteristics' to see which time type was used and what period it was entered for.

- ▼ Free characteristics
  - Action Type
  - Agency Hire Date
  - Att/Abs End Dt
  - Att/Abs Strt Dt
  - Att/Abs Type
  - Cal Mth/Year
  - EE Time Mngt. Status
  - Employee Group
  - Employee Subgroup
  - Employment Status
  - Exceptions
  - Job
  - Length of Service
  - LOA Processed Dt
  - LOA SeqNr
  - Original Hire Date
  - Personnel Area
  - Personnel Subarea
  - Position
  - Prior Position
  - Supervising Employee
  - Supervising Position
  - Work Schedule Rule



3. **Timesheet Entry Overlaps Multiple Z3 Actions:** Each time sheet entry when an employee is on an LOA event should correspond to the dates of the LOA event. When an employee has multiple Z3 actions (i.e. moved from LOA/FMLA to LOA/Short Term Disability) the timesheet entries should be entered separately to clearly delineate which block of time is allocated to each type of LOA. Because the report attempts to associate timesheet entries within the dates of the LOA event, cases where the timesheet overlaps the end date of one event and the begin date of the second event the timesheet entry will be associated with the first LOA record. In order to accurately depict how the absence data was used, it is necessary for the timesheet records to be modified so that they align themselves within the actual LOA dates.

In the example below there are two LOA actions recorded that span multiple years. The time entry is associated with the first action record. The 'Exception' indicator located in 'Free Characteristics' is available to easily locate records where the timesheet entry cannot be isolated to one specific action record, in this case these records have been flagged as an exception because the time entry overlaps both action records.

Load Date 11/03/2011													
Employee's Name	Employee	Exceptions	LOA Strt Dt	LOA End Dt	Action Reason	AttiAbs Strt Dt	AttiAbs End Dt	LWP Hours 9000 9200 9300 9685	LWOP Hours 9400	Other Hours	Total Hours	Total AttiAbs Days	Action Reason Count
OYL, OLIVE	488532	X	12/27/2008	12/26/2009	20 Short-Term Disability Regular	04/01/2009	03/20/2010		2,024.00		2,024.00	253.000	0
						#	#			0.00	0.00	0.000	1
			12/27/2009	03/20/2010	21 Short-Term Disability Extended	#	#			0.00	0.00	0.000	1
									2,024.00	0.00	2,024.00	253.000	2

4. **Timesheet Entry Exceeds the dates of the Z3 Action (extends into another Non LOA related action):** This issue is caused generally when a block of time is entered to cover an LOA event but it exceeds the effective dates of the event. When this occurs the 'Exception' flag is set to indicate that there is an issue with the time entry dates. In the example below the absence end date is 10/31/2011 however the LWOP event ended on 10/28/2011 so the record is flagged as an exception.

Employee's Name	Employee	Exceptions	LOA Strt Dt	LOA End Dt	Action Reason	AbiAbs Strt Dt	AbiAbs End Dt	LWP Hours 9000 9200 9300 9685	LWOP Hours 9400	Other Hours	Total Hours	Total AbiAbs Days	Action Reason Count
RICH, RICHE	88538	X	03/20/2011	10/28/2011	20 Short-Term Disability Regular	03/19/2011	03/21/2011		20.25		20.25	2.000	1
						10/27/2011	10/31/2011		24.00		24.00	3.000	0

5. **Employee Moving In and Out of LOA Repeatedly:** Sometimes when an employee is experiencing an illness or family event that causes them to be out on LOA it is necessary to move them from one action reason to another. This will cause multiple records to be entered into the system for that employee. In other cases actions have been generated in error. The report can be used to evaluate cases where multiple LOA actions have been entered for an employee and determine whether or not actions have been created in error. To gain visibility into the types of actions per employee use the following steps.
- Run the report for the employee population and dates being evaluated.
  - Drag off the 'Action Reason' and dates ('LOA Strt Dt' and 'LOA End Dt'). This report now contains all of the employees who have been on an LOA event during the period being evaluated. By reviewing the 'Action Reason Count' key figure it is easy to see which employees have had multiple LOA actions entered.
  - To reduce the total report to include only those employee's with more than one LOA event you can follow the instructions in case 2 to build a condition using 'Action Reason Count' as the key figure, > (greater than) as the operator and 1 as the value.
  - Optionally you can sort the 'Action Reason Count' column either with the condition above or without so that those employees with the largest number of actions are placed at the top of the report. To accomplish this you would:
    - Right click on the 'Action Reason Count' column to get the context menu.
    - Highlight Sort then choose Descending.